

Task II:

Certification

&

Recertification

Module A:

How to Certify & Recertify at WIC

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Overview

Introduction

This module will help you understand how participants are certified and recertified at WIC.

This module covers information about certifying and recertifying a participant. **It, however, is NOT a substitute for ISIS training. You will need to be familiar with ISIS to certify and recertify a participant.**

Learning Objectives

After completing this module the Nutrition Assistant will be able to:

- explain eligibility* and certification,
- describe what qualifies as proof of identity, income, and residency,
- identify and explain the purpose of each of the standard WIC forms,
- explain the anthropometric, biochemical, clinical, and dietary information needed for each category,
- explain what the certification period* is for each category of participant,
- explain priority ranking,
- explain what priorities the agency is currently serving and why it may change,
- explain why an applicant may be ineligible,
- explain the differences between certification and recertification,
- explain why a participant may be disqualified, and
- show in a role play situation, how to assess participant understanding of the WIC program.

** Words that you may not know are **underlined**. Definitions for these words can be found in the **Glossary** at the end of the module. (Note: Words are only underlined the first few times they appear in the text.)*

How WIC Works

Process

An applicant goes through several steps to get on WIC. These steps are:

- screening for an enrollment appointment,
- determining eligibility, and
- certification.

A participant goes through 2 steps while being served by WIC. These steps are:

- follow-up appointments, and
- recertification or disqualification.

Chart of How WIC Works

The chart on the next 2 pages describes each of these steps.

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How WIC Works (continued)

Step	Description
Applicant Screening	During applicant screening the WIC staff person: <ul style="list-style-type: none">• gets information about a family & individual,• screens out possible applicants who would not qualify for WIC, and• sets up an enrollment appointment for applicants who may qualify for WIC.
Determining Eligibility	This is when the WIC staff person decides if an applicant qualifies for the WIC program. An applicant is eligible for WIC if s/he meets 4 criteria: <ul style="list-style-type: none">• category,• residence,• income, and• nutritional need.
Certification	Certification (also called enrollment) is putting an eligible applicant on the WIC program. During certification the WIC staff person: <ul style="list-style-type: none">• explains eligibility,• orients the new WIC participant to the program,• gives nutrition education,• makes referrals,• schedules a return appointment, and• gives food instruments.
Follow-Up Appointments	During follow-up appointments the WIC staff person: <ul style="list-style-type: none">• gives nutrition education,• makes referrals,• schedules a return appointment, and• gives food instruments.

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How WIC Works (continued)

Step	Description
Recertification or Disqualification	<p>Recertification is seeing if the participant can stay on the WIC program. During recertification the WIC staff person:</p> <ul style="list-style-type: none">• explains eligibility,• gives nutrition education,• makes referrals,• schedules a return appointment, and• gives food instruments. <p>Disqualification is the process of taking a participant off of the WIC program.</p>

Applicant Screening

Purpose

The purpose of applicant screening is to:

- get information about a family and individual,
 - screen out possible applicants who would not qualify for WIC,
 - create a partial WIC record, and
 - set up an enrollment appointment.
-

3 Methods of Screening

There are 3 methods of applicant screening. These are:

- Quick screening,
- Full screening without the Medi-Cal Eligibility Data System (MEDS), and
- Full screening with MEDS.

You will learn more about these in ISIS training.

Screening Questions

During screening the WIC staff person asks the applicant if s/he:

- is in a category served by WIC,
 - lives in the agency's service area,
 - is already on WIC, and
 - is participating in the Commodity Supplemental Food Program (CSFP).
-

Answers to Screening Questions

An applicant's answers to the screening questions will determine if s/he gets an enrollment appointment.

To qualify for WIC an applicant must be in a category served by WIC and live in the agency's service area. The section "Determining Eligibility" will explain this in more detail.

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Applicant Screening (continued)

Answers to Screening Questions (continued)

If a person is already on WIC s/he may **NOT** be enrolled again. A person cannot be enrolled in WIC at 2 different sites for the same agency or at 2 different agencies at the same time.

If a person is on the Commodity Supplemental Food Program (CSFP), s/he may **NOT** be enrolled in the WIC Program. (CSFP is a program that gives food to some people with low-income. It is only available in a few communities in California.) People **cannot** participate in WIC and CSFP at the same time.

Check with your supervisor to see if CSFP is available in your community.

Dual participation is

- enrolling at more than 1 WIC site or agency at the same time

OR

- being on WIC and the Commodity Supplemental Food Program (CSFP) at the same time.

Check with your supervisor to see how dual participation is handled in your agency.

Identity

Policy

Each applicant, participant, alternate, and proxy must provide proof of identity (ID).

The local agency requires proof of identity:

- from each applicant at initial certification and
- from an alternate or proxy at each appointment.

The local agency cannot certify, issue a WAF, or issue food instruments to individuals who cannot give proper identification.

Proof of Identity

Local agencies are strongly **encouraged to request a photo ID as proof of identity for adults**. If the person cannot provide a photo ID, then other forms of ID may be accepted.

Proof of identity for infants or children do not need to include a photo.

The chart on the next page lists documents that may be used as proof of identity.

The local agency may accept the WIC Authorization Folder (WAF) as proof of identity for a participant at recertification and any appointments thereafter once initial proof of identity has been established.

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Identity (continued)

Proof of Identity

The following items containing the name of the person presenting it may be accepted as documentation of identity:

Photo ID –drivers license; DMV-issued ID; passport; work, school, military, or bus pass ID card
Infant Hospital Record –crib card; hospital band; or discharge papers
Health, Medi-Cal, HMO, or County Services Access Card
Social Security Card
Birth Certificate or Hospital Birth Verification
Immigration Papers
Marriage License or Baptismal Certificate
Other <ul style="list-style-type: none"> • foster child placement letter/notice • court orders (divorce, child support, alimony or adoption) • immunization record • voter registration receipt • paycheck stub • blank check with applicant's name printed on it • Medi-Cal, Food Stamp or TANF letter • Supplemental Security Income (SSI) letter • unemployment documents • housing lease or rent receipt • loan papers from bank/finance company • property tax receipt • medical records • student ID card (without photo) • library card • any other document deemed acceptable by the local agency

Identity (continued)

Self Declaration

Self declaration of identity is **only** accepted from:

- victims of disaster,
- migrants, and
- homeless persons.

The participant must sign a statement verifying her/his identity. This note must be kept in the agency's files. A simple handwritten note signed and dated by the applicant/participant is sufficient.

Fraud

Sometimes, though not often, a person may give you fake identification. It is your responsibility to question and ask for another form of ID whenever you feel uncomfortable with an item presented as proof of identity.

Check with your mentor or supervisor to see how your local agency deals with possible fraud.

Determining Eligibility

Eligibility

An applicant is eligible for WIC if s/he meets 4 criteria:

- category,
- residence,
- income, and
- nutritional need.

Criteria Chart

The chart below summarizes the 4 criteria.

Criteria	Description
Category	An applicant must be: <ul style="list-style-type: none">• pregnant,• breastfeeding,• non-breastfeeding,• an infant or• a child between 1 and 5 years old.
Residence	An applicant must: <ul style="list-style-type: none">• live in the area served by the WIC agency.
Income	An applicant must: <ul style="list-style-type: none">• have a total gross income for the family equal to or less than 185% of the federal poverty level or• receive/be on:<ul style="list-style-type: none">➤ Food Stamps,➤ Temporary Assistance for Needy Families (TANF),➤ Medi-Cal, or➤ the Food Distribution Program on Indian Reservations (FDPIR).
Nutritional Need	An applicant must: <ul style="list-style-type: none">• have at least one <u>indicator of nutritional need</u> (a health problem or habit that puts the applicant's health at risk).

Category

5 Categories

The chart below describes the 5 categories and lists their ISIS codes.

Category	Description	ISIS Code
Pregnant	A pregnant woman	P
Breastfeeding	A woman who is breastfeeding her infant up to 1 year after the infant's birth	B
Non-Breastfeeding	A non-breastfeeding woman up to 6 months after the end of her pregnancy. (The end of pregnancy can be due to a live birth, still birth, miscarriage or therapeutic abortion.)	N
Infant	A child under 1 year old	I
Child	A person between 1 and 5 years old	C

Proof

Applicants do **NOT** need to prove category. If there is any doubt about the applicant's category, the local agency should get documents from the applicant.

Residence

Definition

To be residence eligible for WIC a person **must live in the area served by the WIC agency**.

It does NOT matter:

- how long the applicant has lived in the area or
- if the applicant is an American citizen, foreigner or undocumented alien. (A green card is **NOT** necessary for WIC eligibility.)

As long as the person lives in the area served by the WIC agency s/he may qualify for WIC.

Proof

Applicants **need to prove** address. The following items with the name of the applicant, spouse or parent of the applicant's expected child or child under the age of 5 years are possible proof of address:

- mail/postcard,
- any bill,
- California Driver's License or ID card,
- pay stub/check with preprinted address,
- rent receipt/mortgage statement/lease agreement,
- Social Security Income (SSI),
- unemployment benefits card/letter, and
- aid verification letter/notice of action.

Proof of address is NOT required if the applicant is:

- homeless,
- a victim of a disaster, or
- a migrant.

Keep the applicant's statement on file and document the information as a comment in ISIS.

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Residence (continued)

Proof (continued)

Check with your mentor or supervisor to see what your agency's policy is regarding proof of residency.

Fraud

Sometimes, though not often, a person may give you proof that is fraudulent. Check with your mentor or supervisor to see how your local agency deals with this.

Income

Definition

An applicant is income eligible for WIC if:

- s/he is adjunctively eligible or
 - her/his total gross income for the family is equal to or less than **185%** of the federal poverty level.
-

Adjunctively Eligible

Adjunctively eligible means the applicant is:

- certified as fully eligible to receive Food Stamps,
- certified as fully eligible or presumptively eligible for Temporary Assistance for Needy Families (TANF),
- certified as fully eligible or presumptively eligible for Medi-Cal,
- a member of a family in which any eligible participant is certified as fully eligible to receive assistance under TANF,
- a member of a family in which any pregnant woman or infant is certified as fully eligible to receive Medi-Cal, or
- a participant in the Food Distribution Program on Indian Reservations (FDPIR).

Many applicants will be adjunctively eligible. You will check this first. Only when an applicant is NOT adjunctively eligible will you determine the applicant's income.

Income Sources

When determining the income of the applicant, make sure to include the income sources listed on the chart on the next page.

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Income (continued)

Income Sources

Monetary Compensation for Services –wages, salaries, unemployment compensation, and fees
Net Income from Farm & Non-Farm Self Employment
Social Security Benefits
Dividends or Interest on Savings Bonds, Income from Estates or Trusts, or Net Rental Income
Public Assistance or Welfare Payments
Government Civilian Employee or Military Retirement or Pensions or Veteran's Payments
Private Pensions or Annuities
Alimony or Child Support Payments
Regular Contributions from Persons Not Living in the Household
Net Royalties
Student Financial Assistance - intended to pay for meals, board, or dependent care.
Cash Awards - lottery or sweepstake winnings, insurance settlements (except those for lost property or expenses), or inheritance
Cash Income –cash received or withdrawn from any source (savings, investments, trust accounts)
Lump Sum Payments Intended for Income –gifts, worker's compensation for lost income, severance pay

Income (continued)

Income Guideline Table

The California WIC Program uses an income guideline table to see if an applicant is income eligible.

Do NOT use it for applicants that are adjunctively eligible.

Using the Income Guideline Table

To determine income eligibility you will need to know the applicant's:

- gross income and
 - the number of persons in the applicant's family unit (a group of related or non-related individuals who live together as one household/economic unit and share income and consumption of goods or services).
-

Proof

The following are possible proof of income:

- income tax form,
- pay stub,
- Social Security Income (SSI),
- unemployment benefits card/letter, and
- aid verification letter/notice of action.

An applicant has a **maximum of 30 days** to show proof of income. If an applicant does NOT have proof of income s/he may self-declare her/his family size and income for a maximum of 30 days. (Check to see what your agency's policy is regarding proof of income.)

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Income (continued)

Proof (continued)

Persons to whom proof of income presents an unreasonable barrier to participation may **self-declare for more than the 30 days**. These include:

- migrant farmworkers,
 - homeless persons,
 - pregnant teens,
 - victims of a disaster, and
 - people who work for cash.
-

Proof of Adjunctive Eligibility

When an applicant has adjunctive eligibility s/he will need to show that s/he receives or is on Food Stamps, TANF, Medi-Cal or FDPIR.

The following are possible proof of adjunctive eligibility:

- a written consent by the applicant to allow verbal verification be obtained by a WIC staff person who contacts the relevant program,
- swiping the Medi-Cal card to interface with MEDS or entering social security information into ISIS,
- a current program identification card,
- a notice of program eligibility, or
- any form of proof that adequately documents eligibility in the relevant program.

Adjunctively eligible applicants do NOT need to prove their income.

Fraud

Sometimes, though not often, a person may give you proof of income that is fraudulent. Check with your mentor or supervisor to see how your local agency deals with this.

Income (continued)

Learning Activity 1

To learn more about how to calculate income and determine income eligibility you may want to try **Learning Activity 1** found at the end of this module.

Nutritional Need

Nutritional Need

To be eligible for WIC, all applicants must have at least one indicator of nutritional need. An indicator of nutritional need is also called nutritional risk.

Nutritional Risk

A nutritional risk is a health problem or habit that puts the person's health at risk.

Nutritional risks are grouped into 5 categories. These are:

- **Anthropometric,**
- **Biochemical,**
- **Clinical,**
- **Dietary, and**
- **Other.**

WIC calls these the A, B, C, D's of nutritional need. The category "Other" includes psychosocial indicators such as abuse, mental illness, and being a migrant.

Anthropometric Risks

Anthropometric risks relate to a person's body measurements, such as height or weight. These risks give us information about an applicant's growth, health and well-being.

An example of an anthropometric risk would be weight that is not "normal" or healthy for height.

Biochemical Risks

Biochemical risks relate to the condition of a person's blood or urine.

Examples of biochemical risks include:

- anemia (iron deficiency) and
 - lead poisoning.
-

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Nutritional Need (continued)

Clinical Risks

Clinical risks relate to a person's past and present medical conditions. They also relate to lifestyle and habits that affect health.

Examples of clinical risks include:

- a miscarriage;
- diabetes;
- current use of alcohol, drugs or tobacco for women;
- chronic infections;
- severe dental problems;
- a birth defect that affects eating; and
- food allergies for infants or children.

Dietary Risks

Dietary risks relate to a person's food intake.

Examples of dietary risks include:

- a woman's diet that is low in calcium or high in fat,
- a child's diet that is low in Vitamin C or high in sugar,
- a toddler's diet that is low in iron, and
- an infant's diet in which cereal has been added to the bottle.

Determining Nutritional Risk

How will you get the information that you will need to determine an applicant's nutritional risk? Here are a few ways:

- WIC referral forms,
- other forms such as the child health and disability prevention program (CHDP) form,
- questionnaires,
- interviews of applicants, and
- food intake records.

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Nutritional Need (continued)

Learning Activity 2

To learn more about the forms used during certification and recertification you may want to try **Learning Activity 2** found at the end of this module.

Certification

Definition

Certification (also called enrollment) is putting an eligible applicant on the WIC program.

What Happens during Certification?

During certification the WIC staff person:

- explains eligibility,
 - orients the new WIC participant to the program,
 - gives nutrition education,
 - makes referrals,
 - schedules a return appointment, and
 - gives food instruments.
-

Certification Using ISIS

You will certify the applicant using a computer system called the Integrated Statewide Information System (ISIS). You will need to be familiar with ISIS to certify an applicant.

Certification Period

Definition

The certification period is the time period during which a WIC participant is authorized to receive WIC food and other WIC services.

Length

The length of the certification period depends on the participant's category.

**Chart of
Certification
Periods**

The chart on the next page describes the certification period for each category.

**Learning
Activity 3**

To learn more about the certification periods for each category you may want to try **Learning Activity 3** found at the end of this module.

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Certification Period (continued)

Length of Certification Period by Category

Category	Length of Certification Period
Pregnant Woman	Length of woman's pregnancy plus up to 42 days
Non-Breastfeeding Woman	About 6 months, period ending with the last day of the 6 th month after the end of pregnancy.
Breastfeeding Woman	About 6 months each, 2 periods, ending with either: <ul style="list-style-type: none">• the end of the month in which mother stops breastfeeding or• in which the infant turns 1 year old whichever comes first
Infant Birth to 6 Months	Varies from 6-13 months, period ending with the end of the month in which the infant turns 1 year old
Infant 7 to 11 Months	6 months (period may go beyond the child's first birthday)
Child	Up to 6 months, period ending with the end of the month in which the child turns 5 years old

Priority Ranking System

Definition

Priority ranking means certain categories of participants with certain nutritional indicators are ranked as more important to serve than other categories.

Why Does WIC Have Priority Ranking?

The federal government created the priority ranking system to make sure that the persons with the greatest nutritional need get WIC services.

Chart of Priority Ranking

The chart on the next page lists and describes Priorities I-VI.

Priorities Served May Differ by Agency

Not every WIC agency can serve all priorities. There is not always enough money, staff, and resources to serve everyone.

Check with your mentor or supervisor to see which priorities your local agency serves.

Learning Activity 4

To learn more about the priority ranking system you may want to try **Learning Activity 4** found at the end of this module.

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Priority Ranking System (continued)

Priorities I-VI

Priority	Sub-priority	Description
I	a	Prenatal women who have an anthropometric, biochemical or clinical indicator of nutritional need
	b	Breastfeeding women who: <ul style="list-style-type: none"> • have an anthropometric, biochemical or clinical indicator of nutritional need • have an infant who qualifies for Priority I
	c	Infants who: <ul style="list-style-type: none"> • have an anthropometric, biochemical or clinical indicator of nutritional need • are being breastfed by a woman who qualifies as Priority I
II	a	Breastfeeding women who have an infant who qualifies for Priority II
	b	Infants under 6 months who are not in Priority I and were born to “WIC moms” or to “would have been WIC eligible moms”
III	a	Children 12-35 months old who have an anthropometric, biochemical or clinical indicator of nutritional need
	b	Non-breastfeeding women with a Level 3 or 4 indicator of nutritional need (anthropometric, biochemical or clinical)
	c	Children 3 to 5 years old who have an anthropometric, biochemical or clinical indicator of nutritional need
IV	a	Prenatal women who have only a dietary indicator of nutritional need
	b	Breastfeeding women who: <ul style="list-style-type: none"> • have only a dietary indicator of nutritional need or • are breastfeeding an infant who qualifies for Priority IV
	c	Infants who have a dietary indicator of nutritional need and are being breastfed by a woman who qualifies for Priority IV
V		Children 12 months and older who have only a dietary indicator of nutritional need
VI		Non-breastfeeding women with a Level 1 or 2 indicator of nutritional need (anthropometric, biochemical, clinical or dietary)

Ineligibility

Definition

An applicant is ineligible (not eligible) for WIC if s/he:

- is lower **priority** than others being served by the agency,
- does not meet nutritional risk criteria (**nutritional need**),
- is not in a **category** served by WIC,
- does not meet **income** eligibility criteria, or
- does not meet the agency service area requirement (**residence**).

Procedure

If an applicant is not eligible for WIC you must:

- tell her/him why s/he is not eligible and
- give her/him the appropriate forms.

Forms

When an applicant is ineligible you will need to fill out the *Notice of Action Affecting WIC Program Applicants* form (DHS 4143). Give the top copy of the form to the applicant. The bottom copy of the form is for your local agency.

You will also need to give the applicant a *WIC Participant Information Sheet (WPIS)*.

Recertification

Definition

Recertification is the process of seeing if the participant can stay on the WIC Program.

Recertification Appointment

The WIC staff person usually schedules a recertification appointment near the end of the participant's certification period.

During the recertification appointment the WIC staff person:

- explains eligibility,
- gives nutrition education,
- makes referrals,
- schedules a return appointment, and
- gives food instruments.

If the participant is no longer eligible, s/he will be disqualified.

If the participant is still eligible, s/he will continue to participate in the WIC Program until the end of this certification period.

Recertification Using ISIS

You will recertify the applicant using the Integrated Statewide Information System (ISIS). You will need to be familiar with ISIS to recertify a participant.

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Recertification (continued)

Recertification vs Certification (continued)

Recertification is very much like certification. There are, however, some differences. The chart below shows the main differences between these processes.

Differences between Certification & Recertification

Item	Certification	Recertification
Client	referred to as “applicant”	referred to as “participant”
ID	proof of ID required	WAF acceptable
ISIS ID number	needs to be established	already in ISIS
WIC orientation	part of appointment	not included in appointment
Non-eligibility	referred to as “ineligibility”	referred to as “disqualification”
Forms	<i>Notice of Action Affecting WIC Program <u>Applicants</u></i> (DHS 4143)	<i>Notice of Action Affecting WIC Program <u>Participation</u></i> (DHS 4304)

Disqualification

Definition

Disqualification is taking a certified participant off of the WIC program.

When Do You Disqualify a Participant?

You will disqualify a participant during recertification.

You will usually disqualify at the end of a certification period. For example, you will disqualify a non-breastfeeding woman whose infant has turned 6 months.

In some situations you will disqualify a participant in the middle of a certification period. For example, you will disqualify a child who turns 5 years old even though s/he is only in the third month of her/his certification period.

Reasons for Disqualification

There are several reasons a participant may be disqualified. The chart on the next 3 pages describes each reason and gives an example for each.

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Disqualification (continued)

Reasons for Disqualification

Reason	Description The participant...	Example
Lower Priority than Others Being Served by Agency	has a nutritional need that is a lower priority than what the agency is serving.	The agency no longer serves non-breastfeeding women with only a dietary risk.
Does Not Meet Nutritional Risk Criteria	no longer has a nutritional need.	A child that was enrolled for anemia & recertified for “regression” has no health problems now.
Not In A Category Served By WIC	no longer falls into a WIC category.	A child that turns 5 years old.
Does Not Meet Income Eligibility Criteria	is over income for family size.	The participant started a new job and is now over-income.
Documentation Not Adequate to Certify Eligibility	does not give documentation such as proof of residency.	The participant was not able to provide proof of residency.
Lost to Follow-Up	misses 2 or 3 consecutive months of appointments.	The participant missed 3 appointments from May 1- August 1, 2000.

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Disqualification (continued)

Reasons for Disqualification (continued)

Reason	Description The participant...	Example
Dual Participation	<ul style="list-style-type: none"> • enrolls at more than 1 WIC site or agency &/or • is on WIC and CSFP at the same time. 	The participant tries to enroll at another WIC site.
OR		
Other Program Abuse	<ul style="list-style-type: none"> • uses, sells, exchanges, or trades food instruments for money, credit, payment for credit or other non-WIC goods & services; • receives food instruments from someone other than a WIC staff person; • behaves rudely or abusively; or • causes disruption at a WIC site or store. 	The participant tried to buy cigarettes with food instruments.

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Disqualification (continued)

Reasons for Disqualification (continued)

Reason	Description The participant...	Example
Misrepresentation of Facts Affecting Eligibility	gives false information affecting eligibility such as reporting only part of the family income or altering documents.	The participant brings in a rent receipt with the city of residence altered.
Other <ul style="list-style-type: none">• Self-disqualification• Death	<ul style="list-style-type: none">• requests to discontinue.• dies.	<ul style="list-style-type: none">• The participant no longer wants to be on WIC.• The participant dies.

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Disqualification (continued)

Disqualifying a Participant

To disqualify a participant you will go through several steps. The steps you follow in ISIS will depend on whether you are disqualifying a family or an individual.

Forms

When disqualifying a family or an individual you will need to fill out a form. The form is called the *Notice of Action Affecting WIC Program Participation* form (DHS 4304). Give the top copy of the form to the participant. The bottom copy of the form is for the local agency.

You will also need to give the family or individual a *WIC Participant Information Sheet (WPIS)*.

Learning Activity 5

To learn more about disqualification you may want to try **Learning Activity 5** found at the end of this module.

Summary

How WIC Works

An applicant goes through several steps to get on WIC. These steps are:

- screening for an enrollment appointment,
- determining eligibility, and
- certification.

A participant goes through 2 steps while being served by WIC. These steps are:

- follow-up appointments, and
 - recertification or disqualification.
-

Identity

Each applicant, participant, alternate, and proxy must provide proof of identity (ID).

The local agency requires proof of identity:

- from each applicant at initial certification and
 - from an alternate or proxy at each appointment.
-

Eligibility

An applicant is eligible for WIC if s/he meets all 4 criteria:

- category,
 - residence/service population,
 - income, and
 - nutritional need.
-

Category

To be eligible an applicant must be:

- pregnant,
 - breastfeeding,
 - non-breastfeeding,
 - an infant or
 - a child.
-

Summary (continued)

Residence

To be eligible for WIC a person must live in the area served by your WIC agency.

Income

An applicant is income eligible for WIC if:

- s/he has adjunctive eligibility or
 - her/his total gross income for the whole family is equal to or less than **185%** of the federal poverty level.
-

Nutritional Need

To be eligible for WIC, all applicants must have at least one indicator of nutritional need/risk.

A nutritional risk is a health problem or habit that puts the applicant's health at risk.

Nutritional risks are grouped into 5 categories.

These are:

- Anthropometric,
 - Biochemical,
 - Clinical,
 - Dietary, and
 - Other.
-

Certification Period

The certification period is the time period during which a WIC participant is authorized to receive WIC food and other WIC services.

The length of the certification period depends on the participant's category.

Priority Ranking

Priority ranking means certain categories of participants with certain nutritional indicators are ranked as more important to serve than other categories.

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Summary (continued)

Ineligibility

An **applicant** is ineligible (not eligible) for WIC if s/he:

- is lower **priority** than others being served by the agency,
 - does not meet nutritional risk criteria (**nutritional need**),
 - is not in a **category** served by WIC,
 - does not meet **income** eligibility criteria, or
 - does not meet the agency service area requirement (**residence**).
-

Recertification

Recertification is the process of reestablishing eligibility for the WIC Program.

Disqualification

Disqualification is the process of taking a **participant** off of the WIC program.

A participant can be disqualified from WIC for the following reasons:

- lower priority than others being served by agency,
 - does not meet nutritional risk criteria,
 - not in a category served by WIC,
 - does not meet income eligibility criteria,
 - documentation not adequate to certify eligibility,
 - lost to follow-up,
 - dual participation or other program abuse,
 - misrepresentation of facts affecting eligibility, or
 - other.
-

Glossary

adjunctive eligibility- Adjunctively eligible means the applicant is: certified as fully eligible to receive Food Stamps; certified as fully eligible or presumptively eligible for Temporary Assistance for Needy Families (TANF); certified as fully eligible or presumptively eligible for Medi-Cal; a member of a family in which any eligible participant is certified as fully eligible to receive assistance under TANF; a member of a family in which any pregnant woman or infant is certified as fully eligible to receive Medi-Cal; or a participant in the Food Distribution Program on Indian Reservations (FDPIR).

alternate- An alternate is a person who may pick up and/or redeem food instruments when a participant cannot do so.

anthropometric risks- Anthropometric risks relate to a person's body measurements such as height, weight, and circumference of the head, waist, arms or legs.

applicant- An applicant is a person who is trying to get on the WIC Program.

biochemical risks- Biochemical risks relate to what is in a person's blood or urine such as hemoglobin (Hgb), hematocrit (Hct), blood sugar, and blood lead levels.

certification- Certification (also called enrollment) is the process of determining eligibility for the WIC Program.

certification period- The certification period is the time period during which a participant is authorized to receive food instruments and other WIC services.

clinical risks- Clinical risks relate to a person's health history and present medical conditions.

CSFP- CSFP is the Commodity Supplemental Food Program. It is a program that gives food to some low-income people.

determining eligibility- Determining eligibility is checking to see if an applicant meets 4 criteria: category, residence, income, and nutritional need.

Glossary (continued)

dietary risks- Dietary risks relate to the foods a person eats.

disqualification- Disqualification is the process of taking a certified participant off of WIC.

dual participation- Dual participation is enrolling at more than 1 WIC site or agency and/or being on WIC and the Commodity Supplemental Food Program (CSFP) at the same time.

eligibility- Eligibility is being qualified to receive WIC services.

enrollment- Enrollment is the process of determining eligibility for the WIC Program.

family unit- A family unit is a group of related or non-related individuals who live together as one household/economic unit and share income and consumption of goods or services.

FDPIR- FDPIR is the Food Distribution Program on Indian Reservations.

gross income- Gross income is the total amount of money a family makes from all sources before taxes are taken out.

homeless- a person is homeless if s/he does not have a fixed and regular nighttime residence or has a primary residence that is a shelter, a place that provides temporary residence, a temporary place in the residence of another individual, or a place not designated for, or ordinarily used as, a regular living space for human beings.

indicator of nutritional need- a health problem or habit that puts the person's health at risk.

ineligible- Ineligible is not being qualified to receive WIC services.

ISIS-ISIS is the Integrated Statewide Information System, a computer system that holds information about WIC participants.

MEDS-MEDS is the Medi-Cal Eligibility Data System.

Glossary (continued)

migrant- A migrant is a farmworker and her/his family members whose main work within the last 24 months has been in agriculture and who have a temporary residence for this work.

nutritional risk- Nutritional risk is a health problem or habit that puts the applicant's health at risk. They are grouped into 4 categories: anthropometric, biochemical, clinical and dietary.

participant- A participant is a person who is on the WIC Program.

priority ranking- Priority ranking means certain kinds of categories of participants with certain nutritional indicators are ranked as more important to serve than other categories.

proxy- A proxy is a person designated by the participant to pickup food instruments.

recertification- Recertification is the process of reestablishing eligibility for the WIC Program.

TANF- TANF is the Temporary Assistance for Needy Families program.

Progress Check

1. Number the steps a person usually goes through to get WIC services. Order them from 1 to 5.

_____ determining eligibility

_____ recertification or disqualification

_____ certification

_____ screening for an enrollment appointment

_____ follow-up appointment

2. Mark with a check (✓) the criteria that must be met for an applicant to be eligible for WIC.

_____ income

_____ citizenship

_____ ethnicity

_____ category

_____ education level

_____ nutritional need

_____ residence

3. Identify and describe the 5 WIC categories.

1.

2.

3.

4.

5.

Progress Check (continued)

4. Mark with a check (✓) the items that would make an applicant ineligible (**NOT** eligible) for WIC.

- _____ has lived in the service area for less than 1 week
- _____ does not have a nutritional need
- _____ is not a U.S. citizen
- _____ is not breastfeeding and has an 8-month old infant
- _____ is homeless
- _____ is not in a category served by WIC
- _____ has income over the allowed maximum for WIC eligibility
- _____ receives food stamps
- _____ is unable to provide proof of residency

5. To be automatically income eligible (adjunctively eligible), an applicant would need to be on 1 of 4 programs. List these 4 programs.

- 1.
- 2.
- 3.
- 4.

Progress Check (continued)

6. Put an “R” before the items that are considered proof of residency and an “I” before the items that are considered proof of income.

- _____ a recent rent receipt showing applicant’s name and address
- _____ last month’s phone bill with the applicant’s name and address
- _____ a 5-year old electric bill with the applicant’s name and address
- _____ an applicant’s unemployment benefits card or letter
- _____ an applicant’s bi-weekly pay stub
- _____ a letter signed by a homeless applicant stating her place of residence

7. List the 4 categories of nutritional need.

- 1.
- 2.
- 3.
- 4.

Progress Check (continued)

8. Fill in the chart below with the categories of the participants addressed by each priority. (Use the chart in Learning Activity 4 to guide you.)

Priority	Categories
I	
II	
III	
IV	
V	
VI	

9. Fill in the chart below showing the differences between certification and recertification.

Item	Certification	Recertification
Client		
ID		
ISIS ID number		
WIC orientation		
Non-eligibility		
Forms		

Progress Check (continued)

10. Mark the reasons you might disqualify a participant from WIC.

- ☐ one of the participant's family members is over income
- ☐ the participant was late to the WIC appointment
- ☐ the participant turns 5 years old
- ☐ the participant abuses the program by selling food instruments
- ☐ the participant no longer has a nutritional need
- ☐ the participant does not follow the advice of the WIC staff

Learning Activities

The following activities are included and are recommended for interactive learning:

- Learning Activity 1: Income Eligibility
- Learning Activity 2: WIC Forms
- Learning Activity 3: Certification Periods
- Learning Activity 4: Priority Ranking
- Learning Activity 5: Disqualifying a Participant
- Learning Activity 6: Role Plays

Activity 1: Income Eligibility

Learning Objectives After completing this activity the Nutrition Assistant will be able to:

- determine income eligibility for several examples.

Background

To determine income eligibility WIC uses the applicant's:

- **monthly income** and
- **family size.**

ISIS will automatically calculate the monthly income amount for you. When your agency's computer system is not working ("ISIS is down") you may need to calculate the applicant's monthly income.

You will also need to know how to determine family size.

To calculate monthly income and family size use the charts on the following pages to guide you.

Instructions

1. Ask your mentor or supervisor for a copy of the most recent *Income Guidelines Table*.
2. Read each case study and determine the family size. Write the family size on the form.
3. Calculate the monthly income for each case study. Write the monthly income on the form.

continued on next page

Activity 1: Income Eligibility

Instructions (continued)

4. Using the *Income Guidelines Table*, determine if the applicant is income eligible for each case study described.
5. Ask your mentor or supervisor to go over the case studies with you.
6. Once you understand how to determine income eligibility, observe a co-worker as s/he enters an applicant's income information into ISIS. Note how income is documented and verified.

Calculating Monthly Income

If income is:	Do the following:	Example
Weekly same amount each week	Multiply the weekly income by 4.3	Tina Kirk makes \$125 each week. $\$125 \times 4.3 = \textbf{\$537.50}$
Weekly different amounts each week	Add weekly incomes together & multiple by 1.1	Gabriella Blanco made \$120 in week 1, \$100 in week 2, \$147 in week 3, & \$189 in week 4. $\begin{array}{r} 120 \text{ -week 1} \\ 100 \text{ -week 2} \\ 147 \text{ -week 3} \\ \underline{189 \text{ -week 4}} \\ \$556 \end{array}$ $\$556 \times 1.1 = \textbf{\$611.60}$
Every 2 Weeks same amount each 2 weeks	Multiply the 2-weekly income by 2.2	Mary Black makes \$628 every 2 weeks. $\$628 \times 2.2 = \textbf{\$1381.60}$
Every 2 Weeks different amounts each 2 weeks	Add 2-weekly incomes together & multiple by 1.1	Sue Wong made \$437 in weeks 1-2 & \$702 in weeks 3-4. $\begin{array}{r} \$437 \text{ -weeks 1-2} \\ \underline{\$702 \text{ -weeks 3-4}} \\ \$1139 \end{array}$ $\$1139 \times 1.1 = \textbf{\$1252.90}$
2 Times per Month income for 1 st & 2 nd half of the month	Add the 2 amounts together	Keishari Johnson made \$600 in the 1 st half of the month & \$455 during the 2 nd half of the month. $\$600 + \$455 = \textbf{\$1055}$
Year-to-Date (so far this year)	Divide total to date by number of months to date	As of April 30, Cheryl Wands had made \$1830 since the beginning of the year. $\$1830 \div 4 = \textbf{\$457.50}$
12 Months	Divide total by 12	Josefina Miguel made \$8400 over the last 12 months. $\$8400 \div 12 = \textbf{\$700}$

Determining Family Size

family unit- A family unit is a group of related or non-related individuals who live together as one household/economic unit and share income and consumption of goods or services.

Usually we count children and their parents as a family unit. Here are some special cases.

If family unit has:	Do the following:
Pregnant Woman with No Children	<p>Count a pregnant woman's family size as: 1 + the number of fetuses[#]</p> <p>For example:</p> <ul style="list-style-type: none"> ➤ a woman expecting twins would be 3 family members and ➤ a woman expecting triplets would be 4 family members. <p>[#] Agencies are NOT required to implement this policy in cases where this conflicts with the participant's beliefs.</p>
Children with Parents Living Apart	<ul style="list-style-type: none"> • Count this child in the family of the parent/guardian where s/he lives most of the time. • Do NOT count the child as a member of both families.
Child not Living in the Home	Count this child only if the family financially supports the child.
Foster Child (If foster family adopts child see below)	Count a foster child as a family of 1. (The welfare agency, not the foster family, is legally responsible for the child.)
Adopted Child or Child Living in Legal Custody	Count an adopted child as part of family unit.
Separate Income Families	<ul style="list-style-type: none"> • Count a person whose income is separate from other persons living in the household as a separate family unit. • Count persons that do NOT earn enough to meet their own living expenses as part of family unit.

Activity 1: Income Eligibility

1. *Pam Hunter is pregnant and has a 7-year-old child. She makes \$900 every 2 weeks.*

What is Pam's family size? _____

What is her family's monthly income? _____

Is she income eligible for WIC?

2. *Maria Vasquez is pregnant and has a 2-year-old daughter. They are living in a shelter for battered women with 3 other women and 7 children. Her husband does not provide any financial support to them. She has made \$12,000 year to date through June 30.*

What is Maria's family size? _____

What is her family's monthly income? _____

Is she income eligible for WIC?

3. *Valentina and Vladimir are married. Valentina is pregnant with their first child and wants to get on WIC. Vladimir makes \$21,000 a year and Valentina makes \$60 a week.*

What is Valentina's family size? _____

What is her family's monthly income? _____

Is she income eligible for WIC?

4. *Evelyn Ruiz and her husband Manuel live together with their 3 children. Manuel is a migrant farmworker. He only works 9 months out of the year. Last year he made \$30,000.*

What is Evelyn's family size? _____

What is her family's monthly income? _____

Is she income eligible for WIC?

5. *Amanda Kelly is pregnant and a single mother of 4 children. She reports an annual income of \$41,000. She also gets Food Stamps.*

What is Amanda's family size? _____

What is her family's monthly income? _____

Is she income eligible for WIC?

Activity 2: WIC Forms

Learning Objectives After completing this activity the Nutrition Assistant will be able to:

- identify and explain each of the forms used during the certification or recertification process.

Background

During certification you will probably use one or more of the following forms:

- *WIC Referral For Pregnant Woman,*
- *WIC Referral For Postpartum/
Breastfeeding Woman, or*
- *WIC Pediatric Referral.*

You will also use other forms such as:

- the Child Health and Disability Prevention Program (CHDP) form,
- questionnaires,
- interviews of applicants, and
- food/nutrition questionnaires such as 24-hour diet recalls.

Instructions

1. Ask your mentor or supervisor to give you copies of the forms your agency uses for certification and recertification. Also make sure s/he shows you the ISIS health questions screens.
2. With the help of your mentor or a co-worker, identify what each form is used for.
3. Complete the form on the next page.

Activity 2: WIC Forms

Name of Form	Description/Use

Activity 3: Certification Periods

Learning Objectives After completing this activity the Nutrition Assistant will be able to:

- explain the certification period for each category of participant.

Instructions

1. For each of the participants described on the next page, identify the participant's:
 - category,
 - initial certification period and
 - next certification period.

If the next certification period is not applicable for the participant mark the form as “not applicable.”

2. Talk with your mentor or supervisor about each of the participants described on the form.
-

Activity 3: Certification Periods

Participant(s) & Situation	Category	Certification Period	
		Initial	Next
Jason Moore is 2 years old.			
Trisha Jackson is 4 years & 8 months old.			
Maria Diaz enrolled 1 month before she gave birth to her son.			
Rosa Hernandez enrolled on June 1 as a breastfeeding woman. She breastfed until November 30. Her daughter turns 1 year old on December 3.			
Juanita Figueroa enrolled on June 1 as a non-breastfeeding woman. Her infant son turns 6 months old on August 5.			
Jasmine Hong was born on May 17. Her mother enrolled her on July 17.			
Daniel Ruiz was born on April 1. His mother enrolled him on November 10.			

Activity 4: Priority Ranking

Learning Objectives After completing this activity the Nutrition Assistant will be able to:

- understand priority ranking and
- explain the priorities her/his agency is currently serving.

Instructions

1. Ask your mentor or supervisor what priorities your agency currently serves and why they may change.
 2. Using the form on the next page put a check mark (✓) next to the priorities your agency currently serves.
 3. On the following page, determine the priorities for the participants described. Write the priority in the box and put a check mark (✓) next to the participants your agency would serve.
-

Activity 4: Priority Ranking

✓	Priority	Sub-priority	Description
	I	a	Prenatal women who have an anthropometric, biochemical or clinical indicator of nutritional need
		b	Breastfeeding women who: <ul style="list-style-type: none"> • have an anthropometric, biochemical or clinical indicator of nutritional need • have an infant who qualifies for Priority I
		c	Infants who: <ul style="list-style-type: none"> • have an anthropometric, biochemical or clinical indicator of nutritional need • are being breastfed by a woman who qualifies as Priority I
	II	a	Breastfeeding women who have an infant who qualifies for Priority II
		b	Infants under 6 months who are not in Priority I and were born to “WIC moms” or to “would have been WIC eligible moms”
	III	a	Children 12-35 months old who have an anthropometric, biochemical or clinical indicator of nutritional need
		b	Non-breastfeeding women with a Level 3 or 4 indicator of nutritional need (anthropometric, biochemical or clinical)
		c	Children 3 to 5 years old who have an anthropometric, biochemical or clinical indicator of nutritional need
	IV	a	Prenatal women who have only a dietary indicator of nutritional need
		b	Breastfeeding women who: <ul style="list-style-type: none"> • have only a dietary indicator of nutritional need or • are breastfeeding an infant who qualifies for Priority IV
		c	Infants who have a dietary indicator of nutritional need and are being breastfed by a woman who qualifies for Priority IV
	V		Children 12 months and older who have only a dietary indicator of nutritional need
	VI		Non-breastfeeding women with a Level 1 or 2 indicator of nutritional need (anthropometric, biochemical, clinical or dietary)

Activity 4: Priority Ranking

Participant	Priority	Served by Agency? (✓)
David is 3 years old and has cerebral palsy (clinical risk).		
LaTonya is pregnant and has a diet low in milk and milk products (dietary risk).		
Cindy Nguyen is a breastfeeding woman with only a dietary risk. She is breastfeeding her son who just had surgery and is a Priority I infant.		
Patricia Gomez is pregnant. She is anemic (biochemical risk).		
Grace Chang is a non-breastfeeding woman with a dietary risk.		
Maria Hernandez is a non-breastfeeding woman. She is underweight (anthropometric risk)		

Activity 5: Disqualifying a Participant

Learning Objectives After completing this activity the Nutrition Assistant will be able to:

- identify why a person may be disqualified at WIC.

Instructions

1. Ask your supervisor or mentor for a copy of the *Notice of Action Affecting WIC Program Participation* form (DHS 4304).
 2. For each of the 4 situations described on the next page determine why the participant was disqualified and list the reason using the *Notice of Action Affecting WIC Program Participation* form as a guide.
 3. Discuss your findings with your mentor or supervisor.
-

Activity 5: Disqualifying a Participant

Situation	Reason
1. Juanita Gomez is a 17-year-old pregnant teen who has recently moved. She no longer lives in the area served by the local agency.	
2. Brenda Jones enrolled her 4-year-old daughter in WIC on May 24. She returns for her recertification appointment. Her daughter is now 5 years old.	
3. Cary Johnson is a breast-feeding mother who has been on WIC for 2 months. She has been having money problems. She tried recently to sell some of her WIC food instruments to a neighbor who reported the situation.	
4. Anna Petrovich is a low-risk non-breastfeeding woman with a biochemical risk. Her agency currently serves categories I-IV.	

Activity 6: Role Plays

Learning Objectives After completing this activity the Nutrition Assistant will be able to:

- show how to assess participant understanding of the WIC Program.

Background

A role play is when 2 or more people act out a scene as though it was “real life”. “Props” such as baby dolls or food models are not needed but may be helpful.

Instructions

1. Have a co-worker role play any 3 of the 5 roles (A-E) described on the following page.
2. Act out the role of a WIC Nutrition Assistant in a session for these 3 participants.
3. Co-Worker: Using the role plays as your guide, act out the role of the participant. Try to be as realistic as possible.
4. After each session, ask your co-worker to tell you what s/he noticed. Make sure to ask her/him for your strengths as well as your weaknesses.

Activity 6: Role Plays

5 Participants

Role Play A	Debbie Jones is a 17-year old pregnant teen. She is new to WIC. She does not know much about WIC.
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Role Play B	Juanita Gomez is enrolling her 2-year-old daughter in WIC. She just moved to the area served by the agency. Her husband works as a migrant farmworker. She says their income is different every month.
------------------------	--

Role Play C	May Nguyen is pregnant. She has 3 other children. The oldest child is 5 years old. She wants to get herself and her 3 children on WIC.
------------------------	--

Role Play D	Cary Johnson is a breastfeeding mother of a 4-month-old daughter. She gets Food Stamps. She wants to get herself and her daughter on WIC. She thinks she can buy any food with WIC food instruments.
------------------------	--

Role Play E	Heidi Wade is a non-breastfeeding mother of a 2-month old. She wants to get herself on WIC. She doesn't realize her son is eligible.
------------------------	--

Progress Check Answers

1. Number the steps a person usually goes through to get WIC services. Order them from 1 to 5.

 2 determining eligibility
 5 recertification or disqualification
 3 certification
 1 screening for an enrollment appointment
 4 follow-up appointment

2. Mark with a check (✓) the criteria that must be met for an applicant to be eligible for WIC.

 ✓ income
 citizenship
 ethnicity
 ✓ category
 education level
 ✓ nutritional need
 ✓ residence

3. Identify and describe the 5 WIC categories.

1. **A pregnant woman**
2. **A woman who is breastfeeding her infant up to 1 year after the infant's birth**
3. **A non-breastfeeding woman up to 6 months after the end of her pregnancy. (The end of pregnancy can be due to a live birth, still birth, miscarriage or therapeutic abortion.)**
4. **An infant- a child under 1 year old**
5. **A child between 1 and 5 years old**

Progress Check Answers (continued)

4. Mark with a check (✓) the items that would make an applicant ineligible (**NOT** eligible) for WIC.

_____ has lived in the service area for less than 1 week

_____✓_____ does not have a nutritional need

_____ is not a U.S. citizen

_____ is not breastfeeding and has an 8-month old infant

_____ is homeless

_____✓_____ is not in a category served by WIC

_____✓_____ has income over the allowed maximum for WIC eligibility

_____ receives food stamps

_____✓_____ is unable to provide proof of residency

5. To be automatically income eligible (adjunctively eligible), an applicant would need to be on 1 of 4 programs. List these 4 programs.

1. **Food stamps,**
2. **Temporary Assistance for Needy Families (TANF),**
3. **Medi-Cal, and**
4. **Food Distribution Program on Indian Reservations (FDPIR).**

Progress Check Answers (continued)

6. Put an “R” before the items that are considered proof of residency and an “I” before the items that are considered proof of income.

 R a recent rent receipt showing applicant’s name and address

 R last month’s phone bill with the applicant’s name and address

 a 5-year old electric bill with the applicant’s name and address

 I an applicant’s unemployment benefits card or letter

 I an applicant’s bi-weekly pay stub

 R a letter signed by a homeless applicant stating her place of residence

7. List the 4 categories of nutritional need.

1. anthropometric

2. biochemical

3. clinical

4. dietary

8. Fill in the chart below with the categories of the participants addressed by each priority. (Use the chart in Learning Activity 4 to guide you.)

Priority	Categories
I	<i>prenatal women, breastfeeding women, infants</i>
II	<i>breastfeeding women, infants</i>
III	<i>children, non-breastfeeding women</i>
IV	<i>prenatal women, breastfeeding women, infants</i>
V	<i>Children</i>
VI	<i>non-breastfeeding women</i>

Progress Check Answers (continued)

9. Fill in the chart below showing the differences between certification and recertification.

Item	Certification	Recertification
Client	<i>referred to as “applicant”</i>	<i>Referred to as “participant”</i>
ID	<i>proof of ID required</i>	<i>WAF acceptable</i>
ISIS ID number	<i>needs to be established</i>	<i>already in ISIS</i>
WIC orientation	<i>part of appointment</i>	<i>not included in appointment</i>
Non-eligibility	<i>referred to as “ineligibility”</i>	<i>referred to as “disqualification”</i>
Forms	<i>Notice of Action Affecting WIC Program Applicants</i>	<i>Notice of Action Affecting WIC Program Participation</i>

Progress Check Answers (continued)

10. Mark the reasons you might disqualify a participant from WIC.

- ☒ one of the participant's family members is over income
- ☐ the participant was late to the WIC appointment
- ☒ the participant turns 5 years old
- ☒ the participant abuses the program by selling food instruments
- ☒ the participant no longer has a nutritional need
- ☐ the participant does not follow the advice of the WIC staff